The Department of Procurement (the "DOP") on behalf of the Department of Human Resources

FC-7936, Employee Benefits



Presentation Made By: Krista A. Morrison, Esq., Contracting Officer

Wednesday, January 14, 2015

Location: Old City Council Chambers

Time: 11:00 am

FC-7936, Employee Benefits



- Welcome and Introductions
 - Krista A. Morrison, Esq., Contracting Officer
- Ethics Department
 - Ms. Nina Hickson, Ethics Officer
- Enterprise Risk Management
 - Mr. Jimmy Porter, Risk Management Analyst
- Office of Contract Compliance
 - Mr. Bruce Bell, Senior Contract Compliance Manager
- User Department: Department of Human Resources
 - Ms. Yvonne Yancy, Commissioner of Human Resources
 - Mr. Louis Amis, Employee Benefits Director
- Closing: Department of Procurement
 - Krista A. Morrison, Esq., Contracting Officer

Be Mindful of...



- Prohibited Contacts
- Non-Authoritative Statements
- Plan Holders <u>vs.</u> Attendees at Pre-Conference
- Last Date for Addendum Questions:
 - o Friday, January 16, 2015 1:00 p.m. (eastern)
- Proposal Due Date:
 - O Wednesday, February 25, 2015, 2:00 p.m. (eastern)
- Oral Interview Sessions (at City's discretion):
 - o March 11-13, 2015

Minimum Qualifications



Each Proponent team member (Service Provider Key Personnel) shall have a minimum of seven (7) years' experience within the last ten (10) years in employee benefits.



City of Atlanta Ethics Office

Ms. Nina Hickson Ethics Officer



Office of Enterprise Risk Management

Mr. Jimmy Porter Risk Management Analyst



Office of Contract Compliance and AWDA

Mr. Bruce Bell Senior Contract Compliance Manager Ms. Shirley Harris Project Coordinator for First Source

Department of Human Resources



- Introduction of Department's Business Objectives
 - o Project Manager: Mr. Louis Amis, Employee Benefits Director
- Opening the Floor for Questions & Answers
 - (Statements Made in this Forum Today are Not Authoritative)

All questions and responses provided are not considered authoritative until placed in writing to the appropriate point of contact within DOP, Krista A. Morrison, Esq., Contracting Officer. She will ensure that a subsequent addendum is issued to all Plan Holders of record.

Contents of Proposals



Proposals should be inclusive of :

I. Informational Proposal

- **Volume I** Information drafted by Proponent
 - Executive Summary;
 - Organizational Structure;
 - Resumes of Key Personnel;
 - Overall Experience; and
 - Management Plan.
- **Volume II** Required Submittal Forms (Forms 1-9)
- **Volume III** Responses to Questionnaires and applicable Attachments

Proponents must submit one (1) stamped "original" and ten (10) copies of the Informational Proposal.

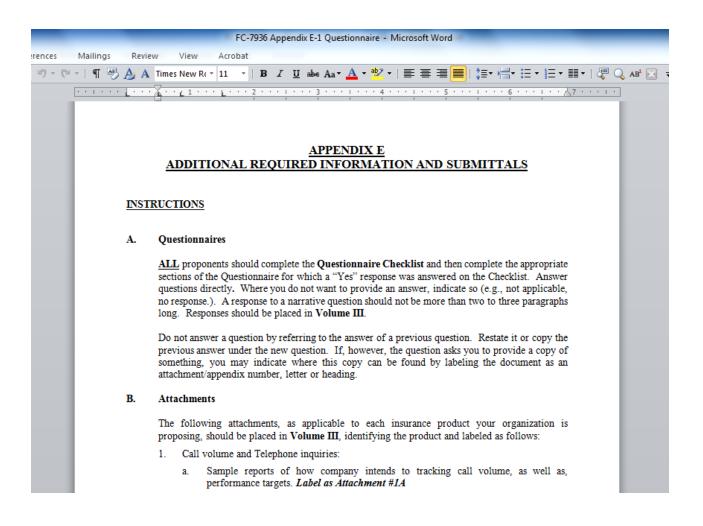
II. Cost Proposal - Exhibit A.1 (forms provided on the USB drive)

Proponents must submit one (1) stamped "original" and ten (10) copies in a separate sealed envelope.

Appendix E - Additional Information and Required Submittals



INSTRUCTIONS



Next Anticipated Procurement Steps -After Proposal Due Date



- Step 1: DOP Will Review Proposal(s) for Responsiveness (within two business days)
 - Form 1 Illegal Immigration Reform and Enforcement Act Forms (IIREA)
 - Form 2 Disclosure Form and Questionnaire
 - Form 3 Proponent Financial Disclosure
 - Form 4.1 Certification of Insurance Ability
 - Form 4.2 Certification of Bonding Ability
 - Form 5 Acknowledgement of Addenda
 - Form 6 Proponent Contact Directory
 - Form 7 Reference List
 - Form 8 Proposal Bond (**not applicable**)
 - Form 9 Required Submittal Checklist
 - Appendix A Office of Contract Compliance Forms
 - Appendix E Responses to Questionnaires and Applicable Attachments
- **Step 2: DOP Will Submit ONLY Responsive Proposals to Internal City Stakeholders to Review for Responsibility:**
 - ✓ Office of Contract Compliance to Review Appendix A Submittals
 - **✓ Office of Enterprise Risk Management** to Review <u>Form 4: Proponents Financial Disclosure</u> Statements
 - **Department of Human Resources** to Review for responsibility, and assessment of a need for Oral Interviews and Subsequent Scheduling of Collaborative Evaluation Session(s)

Reminders

- Addendum Deadline:
 - o Friday, January 16, 2015, 1:00 p.m. (eastern)
 - **QUESTIONS RECEIVED THEREAFTER MAY NOT BE CONSIDERED**
- Proposal Due Date:
 - Wednesday, February 25, 2015, 2:00 p.m. (eastern)
 - **ABSOLUTELY NO PROPOSALS WILL BE ACCEPTED AFTER 2:00 P.M.**



Primary Point of Contact: Krista A. Morrison, Esq., Contracting Officer

Email: kamorrison@atlantaga.gov

Direct Phone Number: 404-865-8709